

# Bookmarks

REVIEWS TO HELP YOU GET, AND STAY, AHEAD • EDITED BY MILTON W. ZWICKER

## Business Development for Lawyers: Strategies for Getting and Keeping Clients

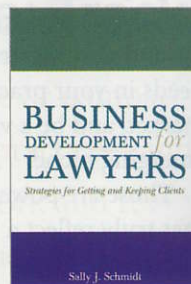
Sally J. Schmidt. ALM Publishing, 2006. 310 pages. \$49.95.  
ISBN: 1-58852136-2. www.lawcatalog.com.

REVIEWED BY MARY BETH PRATT

Several things are important to me and other readers of “how-to” books: Is the book well organized? Are the major points and themes clearly explained? Are there practical guidelines and advice? What experience has the author had with the intended audience? I’m happy to say that on each of these scores, *Business Development for Lawyers* met and, in most cases, exceeded my expectations. This is a book that every lawyer should read and use. Marketing staff and law firm administrators also will find it quite helpful.

The author, Sally J. Schmidt, is a well-known law firm marketing consultant who has many years of experience in the field. The book is written in plain English and well organized with tips, checklists and shaded boxes emphasizing key points. It also makes liberal use of easy-to-read bulleted lists. Another organizational plus is that each chapter ends with a fill-in-the-blanks form that readers can use to organize their own business development activities, including assessing the obstacles they may face.

Early on, Schmidt makes an important distinction between marketing and business development, something that many lawyers and marketers fail to do. Marketing, she writes, is “often related to ‘positioning’ ... such as writing, speaking and joining organizations.” These activities build awareness and credibility for lawyers and law firms. Business development is getting and keeping clients by



building relationships. This requires direct, one-on-one activities, and it serves as the core focus of the book.

There are 16 chapters in the book, with the chapters about specific marketing activities organized under the part title “Positioning Yourself and Your Practice.” According to Schmidt, lawyers should undertake the kinds of activities

that are meaningful to them and that they like. If, for example, you don’t enjoy public speaking, you probably won’t be very good at it. If you don’t believe in the mission of an organization, you won’t make a good board member.

In addition, Schmidt encourages lawyers to be realistic about the amount of time they have to spend on marketing and business development. For a very new lawyer, 50 to 100 hours per year may be just right. Senior lawyers and firm leaders are likely to spend 250 to 500 hours per year, much of it devoted to client relationships. Because time is necessarily limited, Schmidt also advises lawyers not to waste time on ineffective activities that may reach the wrong audience, particularly when writing and speaking. Moreover, her book helps lawyers understand why these things often don’t bring in clients.

The most important chapters are those specific to business development, grouped under the part title “Developing Business.” Business, of course, comes from developing relations—and the chapters on dealing with client relationships, cross-selling and handling difficult client situations draw on Schmidt’s 20-plus years of very significant work for law firms as well as her numerous client interviews. She also comments on research conducted about the effect that client loyalty has on profits.

Clients’ primary gripe is lack of responsiveness. Schmidt, fortunately, has numerous tips for readers about returning calls, working with staff, the importance of learning about clients’ needs, adding value to client relationships outside of just servicing legal needs, and dealing with fees at the beginning of the relationship. It’s basic, common sense but it is often overlooked in the pressure to bill hours.

The chapter on “Cross-Selling and Expanding Relationships” points out that without complete satisfaction, there is no opportunity to cross-sell. This chapter also



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includes sample charts for tracking information as well as suggestions for lawyers who want their partners to cross-sell them.

The chapter on “Managing Relationships with Significant Clients” is a must-read for every lawyer, but especially for new ones. In addition to the practical advice in the text, there are charts to help the client relationship manager track personnel at the client company, a client team’s “client service plan,” and questions for the client interview. This leads naturally into the next chapter on “Handling Difficult Client Situations.” Schmidt discusses “bad” clients, difficult partners, unhappy or disappointed clients and clients that are acquired. The advice is straightforward and includes an ethics discussion.

She also covers referral relationships (a significant source of business for most lawyers); making presentations and preparing proposals; following up (it takes “time and timing”); and asking for the business. Then she wraps things up with a section on how to build your own personal marketing plan. And, if you’ve read the book and completed the worksheets at the end of each chapter, you’ll be well on your way by the time you reach the form on page 293. Success, after all, is a process of building and developing skills.

Personally, I would have liked more discussion of the challenges created by clients that use online bidding and procurement departments to write requests for proposals for legal services. But there are no easy answers for these trends. Schmidt’s suggestions for responding to requests and communicating with clients will help lawyers begin and continue discussions to improve relationships.

I’m glad Schmidt selected the book title she did, because it’s easy to hide behind passive marketing efforts. The best strategy won’t get results without the personal, one-on-one business development commitments of the lawyers. In *Business Development for Lawyers: Strategies for Getting and Keeping Clients*, Schmidt has taken her wealth of experience and distilled it into a very readable and practical book. LP

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